

## **Email and Communication Management**

- Answer and manage emails and voicemails throughout the day.
- Handle phone calls and emails when you're away.
- Send confirmations and out-of-office reminders to clients.

## **Client Management**

- Handle initial consultations with potential clients.
- Check in with new clients and see if they're a good fit.
- Screen and follow up with new client inquiries.
- Manage client booking, including scheduling, canceling, and rescheduling client appointments.
- Manage wait lists.
- Add and create new clients to your EHR system.
- Send necessary paperwork to new clients and remind them to fill it out.
- Handle client requests for changes and update their records.
- Log and track new client referrals.
- Calculate how many referrals become clients each month.

## **Administrative and Organizational Tasks**

- Keep your email inbox neat and organized.
- Organize and manage your Google Drive files.
- Keep waiting lists updated.
- Update important performance numbers weekly or monthly.
- Set up meetings and send out invites.
- Keep track of everyone's availability.
- Offer general administrative support for your team.
- Send out weekly reminders about unpaid client balances.
- Provide weekly summaries on time management, scheduled clients, and any pending new ones.
- Suggest ways to make your practice run smoother.
- Assisting with transitions when a therapist leaves your practice.
- Assisting in creating and updating your business procedures.

## **Business Development and Research**

- Gather information for your business from the internet.